

# Form for Fresh Nomination / Change of Existing Nomination



Applicable for Individual Unitholders only - whether holding Units Singly or Jointly with other holders

Please read the instructions carefully before filling up this form

<b>Name of 1<sup>st</sup> Holder</b>	Mr./Ms	FIRST	MIDDLE	LAST
<b>Name of 2<sup>nd</sup> Holder</b>	Mr./Ms	FIRST	MIDDLE	LAST
<b>Name of 3<sup>rd</sup> Holder</b>	Mr./Ms	FIRST	MIDDLE	LAST

I/We, the above-named investor/s of LIC Mutual Fund, do hereby nominate the person(s) more particularly described hereunder to receive the Units held in my/our Folio/s listed below in the event of my / our death by cancelling the nomination(s) made by me / us previously in respect of the units held by me/us in the Folio/s listed below.

Sr.#	Folio No / Application No.
1	
2	
3	

## 01. NOMINEE DETAILS

<b>Name of the 1<sup>st</sup> Nominee*</b>	FIRST	MIDDLE	LAST
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Share of Nominee (%) (mandatory):

Relationship with Applicant (mandatory) Please Tick (✓)  Parents  Spouse  Children  Sibling  Others (Mandatory to Specify)

Mobile Number (mandatory):

Email (mandatory):

**Nominee/Guardian (in case of minor) Identification details** (mandatory) [Tick any one of the following and provide the ID number. No copies required]

<input type="checkbox"/> PAN	<input type="checkbox"/> Driving License
<input type="checkbox"/> Aadhaar	<input type="checkbox"/> Passport (for NRIs/OCIs/PIOs)

Date of Birth (in case nominee is a minor) (mandatory) D D M M Y Y Y Y

Guardian Name (in case nominee is a minor):

Postal Address (mandatory):

City: State: PIN

<b>Name of the 2<sup>nd</sup> Nominee*</b>	FIRST	MIDDLE	LAST
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Share of Nominee (%) (mandatory):

Relationship with Applicant (mandatory) Please Tick (✓)  Parents  Spouse  Children  Sibling  Others (Mandatory to Specify)

Mobile Number (mandatory):

Email (mandatory):

**Nominee/Guardian (in case of minor) Identification details** (mandatory) [Tick any one of the following and provide the ID number. No copies required]

<input type="checkbox"/> PAN	<input type="checkbox"/> Driving License
<input type="checkbox"/> Aadhaar	<input type="checkbox"/> Passport (for NRIs/OCIs/PIOs)

Date of Birth (in case nominee is a minor) (mandatory) D D M M Y Y Y Y

Guardian Name (in case nominee is a minor):

Postal Address (mandatory):

City: State: PIN

<b>Name of the 3<sup>rd</sup> Nominee*</b>	FIRST	MIDDLE	LAST
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Share of Nominee (%) (mandatory):

Relationship with Applicant (mandatory) Please Tick (✓)  Parents  Spouse  Children  Sibling  Others (Mandatory to Specify)

Mobile Number (mandatory):

Email (mandatory):

**Nominee/Guardian (in case of minor) Identification details** (mandatory) [Tick any one of the following and provide the ID number. No copies required]

<input type="checkbox"/> PAN	<input type="checkbox"/> Driving License
<input type="checkbox"/> Aadhaar	<input type="checkbox"/> Passport (for NRIs/OCIs/PIOs)

Date of Birth (in case nominee is a minor) (mandatory) D D M M Y Y Y Y

Guardian Name (in case nominee is a minor):

Postal Address (mandatory):

City: State: PIN

**02. NOMINEE INFORMATION ON STATEMENT OF HOLDING**

I / we want the details of my / our nominee to be printed in the statement of account, provided to me/us by the AMC as follows: Please tick (✓)

Name of nominee(s)    **OR**     Nomination: Yes/No

OR

**I/WE DO NOT WISH TO NOMINATE**

**FOR OPTING OUT:** I / We hereby confirm that I / We do not wish to appoint any nominee(s) in my / our MF Folio and understand the issues involved in non-appointment of nominee(s) and further are aware that in case of death of all the account holder(s), my / our legal heirs would need to submit all the requisite documents / information for claiming of assets held in my / our MF Folio, which may also include documents issued by Court or other such competent authority, based on the value of assets held in the MF Folio.

**03. SIGNATURES & DECLARATIONS**

I/We have read and understood the instructions on nomination given below/overleaf and I/We hereby undertake to abide by the same. The instructions contained herein supercedes all previous nominations made by me/us in respect of the folio(s) mentioned above.

Name(s) of holder(s)	Name	Signature as per mode of holding / Thumb Impression	Signature of Two Witness	Name of witness & Address (Wherever applicable)*
Sole/First Holder (Mr./Ms.)		⊗	⊗	
Second Holder (Mr./Ms.)		⊗	⊗	
Third Holder (Mr./Ms.)		⊗	⊗	

\*(Required if the account holder uses a thumb impression instead of a wet signature)

**04. ADDITIONAL CONDITIONS (IF APPLICABLE)****Joint Accounts - Transmission of Assets**

Scenario	Description
Transmission of Account / Folio to Demise of One or More Joint Holders	Surviving holder(s) through name deletion: The surviving holder(s) shall inherit the assets as owners.
Demise of All Joint Holders Simultaneously - Having Nominee	Nominee: The Nominee will receive the assets.
Demise of All Joint Holders Simultaneously - Not Having Nominee	Legal heir(s) of the youngest holder: The assets will be inherited by the legal heir(s) of the youngest holder